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Grain and Feed

U.S. Captures 47.4% Share in JFY 2004 Rice Tenders

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Approved by:

Clay Hamilton

U.S. Embassy

Prepared by:

Hisao Fukuda

Report Highlights:

On March 24, the Ministry of Agriculture, Forestry and Fisheries (MAFF) conducted its final Ordinary Minimum Access (OMA) tenders for Japanese Fiscal Year (JFY) 2004. With this tender, the Government of Japan (GOJ) completed all minimum access rice tenders for JFY 2004. Overall, the U.S. rice import market share was 47.4%, roughly the same level as in previous years.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Tokyo [JA1]
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On March 24, the Ministry of Agriculture, Forestry and Fisheries (MAFF) conducted its final Ordinary Minimum Access (OMA) rice tender for Japanese Fiscal Year (JFY) 2004, April 2003 through March 2004. Combined with the Simultaneous Buy and Sell (SBS) tenders, the Government of Japan (GOJ) completed all minimum access rice tenders for JFY 2004. Overall, the U.S. import market share was 47.4%, the same level as the previous years.

The following tables show the overall results of the JFY 2004 minimum access rice tenders, as well as the detailed results of the SBS and OMA tenders.

Overall Results of JFY 2004 Rice Tenders (SBS and OMA combined)

Unit: MT

	U.S.	China	Australia	Thailand	Vietnam	Others	Total
SBS	23,413	63,877	4,658	1,211	80	749	93,988
OMA	298,500	24,000	13,000	163,300	85,944	0	584,744
Total	321,913	87,877	17,658	164,511	86,024	749	678,732
Share	47.4%	12.9%	2.6%	24.2%	12.7%	0.1%	100.0%

Source: MAFF

Results of JFY 2004 SBS Tenders

First SBS Tender (May 21, 2004)

Unit: MT

	China	U.S.	Thailand	Australia	Vietnam	Pakistan	India	Italy	Total
Quantity	13,286	2,724	216	4,324	40	139	18	17	20,764
Share	64.0%	13.1%	1.0%	20.8%	0.2%	0.7%	0.1%	0.1%	100%

Second SBS Tender (August 27, 2004)

	China	U.S.	Thailand	Australia	Vietnam	Pakistan	India	Taiwan	Total
Quantity	9,332	6,810	178	89	40	60	36	18	16,563
Share	56.3%	41.1%	1.1%	0.5%	0.2%	0.4%	0.2%	0.1%	100%

Third SBS Tender (November 12, 2004)

	China	U.S.	Thailand	Australia	Vietnam	Italy	India	Taiwan	Total
Quantity	12,042	5,227	316	185	0	51	72	90	17,983
Share	67.0%	29.1%	1.8%	1.0%	0.0%	0.3%	0.4%	0.5%	100%

Fourth SBS Tender (December 21, 2004)

	China	U.S.	Thailand	Australia	Vietnam	Pakistan	India	Taiwan	Total
Quantity	15,925	7,209	501	60	0	100	90	18	23,903
Share	66.6%	30.2%	2.1%	0.3%	0.0%	0.4%	0.4%	0.1%	100%

Fifth SBS Tender (February 22, 2005)

	China	U.S.	Thailand	Australia	Vietnam	Pakistan	India	Brazil	Total
Quantity	13,292	1,443	0	0	0	0	0	40	14,775
Share	90.0%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	100%

FY 2004 SBS Tenders (First - Fifth)

	China	U.S.	Thailand	Australia	Vietnam	Pakistan	India	Other	Total
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Quantity	63,877	23,413	1,211	4,658	80	299	216	234	93,988
Share	68.0%	24.9%	1.3%	5.0%	0.1%	0.3%	0.2%	0.2%	100%

Source: MAFF

Results of JFY 2004 OMA Rice Tenders

First OMA Tender (June 18, 2004)

Unit: MT

	U.S.	China	Australia	Thailand	Vietnam	Total
Long/Milled				1,200		1,200
Glut/Milled				400		400
Broken/Milled				5,600		5,600
Total	0	0	0	7,200	0	7,200
Share	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Second OMA Tender (September 27, 2004)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled						0
Long/Milled				2,300		2,300
Glut/Milled						0
Broken/Milled				4,900		4,900
Glut/Broken/Milled						0
Total	0	0	0	7,200	0	7,200
Share	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%

Third OMA Tender (October 22, 2004)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	22,620					22,620
Long/Milled				7,000	7,000	14,000
Glut/Milled						0
Broken/Milled	3,380			7,000		10,380
Glut/Broken/Milled						0
Total	26,000	0	0	14,000	7,000	47,000
Share	55.3%	0.0%	0.0%	29.8%	14.9%	100.0%

Fourth OMA Tender (November 17, 2004)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	33,930					33,930
Long/Milled				5,270	7,000	12,270
Glut/Milled						0
Broken/Milled	5,070			2,130		7,200
Glut/Broken/Milled						0
Total	39,000	0	0	7,400	7,000	53,400
Share	73.0%	0.0%	0.0%	13.9%	13.1%	100.0%

Fifth OMA Tender (November 26, 2004)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	22,620		10,920			33,540
Long/Milled				10,610		10,610
Glut/Milled						0
Broken/Milled	3,380		2,080	9,920		15,380
Glut/Broken/Milled				970		970

Total	26,000	0	13,000	21,500	0	60,500
Share	43.0%	0.0%	21.5%	35.5%	0.0%	100.0%

Sixth OMA Tender (December 8, 2004)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	51,940					51,940
Medium/Brown	5,300					5,300
Glut/Milled		7,000		21,550	7,000	35,550
Broken/Milled	7,760			19,130		26,890
Glut/Broken/Milled				2,320		2,320
Total	65,000	7,000	0	43,000	7,000	122,000
Share	53.3%	5.7%	0.0%	35.2%	5.7%	100.0%

Seventh OMA Tender (January 20, 2005)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	33,930					33,930
Long/Milled				15,300	18,000	33,300
Glut/Milled						0
Broken/Milled	5,070			2,900		7,970
Glut/Broken/Milled				3,800		3,800
Total	39,000	0	0	22,000	18,000	79,000
Share	49.4%	0.0%	0.0%	27.8%	22.8%	100.0%

Eighth OMA Tender (January 28, 2005)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	33,760					33,760
Medium/Brown	200					200
Long/Milled					9,000	9,000
Glut/Milled						0
Broken/Milled	5,040					5,040
Glut/Broken/Milled						0
Total	39,000	0	0	0	9,000	48,000
Share	81.3%	0.0%	0.0%	0.0%	18.8%	100.0%

Ninth OMA Tender (February 24, 2005)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	45,240					45,240
Medium/Brown						0
Long/Milled				14,130		14,130
Glut/Milled						0
Broken/Milled	6,760			12,970		19,730
Glut/Broken/Milled				7,900		7,900
Total	52,000	0	0	35,000	0	87,000
Share	59.8%	0.0%	0.0%	40.2%	0.0%	100.0%

Tenth OMA Tender (March 18, 2005)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	10,875					10,875
Medium/Brown						0
Long/Milled		17,000			30,000	47,000
Glut/Milled						0
Broken/Milled	1,625			6,000		7,625

Glut/Broken/Milled						0
Total	12,500	17,000	0	6,000	30,000	65,500
Share	19.1%	26.0%	0.0%	9.2%	45.8%	100.0%

Eleventh OMA Tender (March 24, 2005)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled						0
Medium/Brown						0
Long/Milled					7,944	7,944
Glut/Milled						0
Broken/Milled						0
Glut/Broken/Milled						0
Total	0	0	0	0	7,944	7,944
Share	0.0%	0.0%	0.0%	0.0%	100.0%	100.0%

FY 2004 OMA Tenders (First - Eleventh)

	U.S.	China	Australia	Thailand	Vietnam	Total
Medium/Milled	254,915		10,920			265,835
Medium/Brown	5,500					5,500
Long/Milled		17,000		55,810	78,944	151,754
Glut/Milled		7,000		21,950	7,000	35,950
Broken/Milled	38,085		2,080	70,550		110,715
Glut/Broken/Milled				14,990		14,990
Total	298,500	24,000	13,000	163,300	85,944	584,744
Share	51.0%	4.1%	2.2%	27.9%	14.7%	100.0%

Source: MAFF